

CENTRAL INTELLIGENCE AGENCY

31 March 1949

INTELLIGENCE MEMORANDUM NO. 140

SUBJECT: Estimate of the Optimum Time of Year for War to Commence,
from the Soviet Viewpoint

25X1A

REFERENCE: Memorandum from Lt. Colonel M. S. Losey to
25X1A [redacted] dated 3 March 1949

1. CIA was requested in reference to prepare an estimate indicating, from the Soviet point of view, the optimum time of year, for war to commence. CIA was asked to give consideration to primarily non-military factors only. The estimate was to be written on the assumption that simultaneous or nearly simultaneous campaigns would be undertaken in:

- a. Western Europe, including Italy and Sicily but excluding the Iberian Peninsula.
- b. Scandinavia
- c. The Near East, including Turkey, Greece, and the Suez-Cairo area
- d. The Far East, including China, Korea, Japan, and the Philippines.

2. In preparing the estimate, CIA considered numerous non-military factors which could possibly have a bearing on the optimum time of year for war to commence. Examination of such factors as traditional vacation periods, seasonal fluctuations in industrial production, parliamentary recesses, and religious holidays and festivals, however, indicate that singly as in combination they are of relatively minor importance to the problem. This is especially true when it is assumed that simultaneous campaigns will be conducted in a number of areas.

The non-military aspect of transportation was considered of considerable importance, but CIA was advised, that the subject has been adequately considered by the JCS in conjunction with the problem of logistics in the various areas.

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3. The only factor considered of sufficient significance to require detailed treatment was that of food supplies in the selected areas at various times of the year--a factor which is considered purely contributory, however, under the assumptions given. A study of the food situation in the selected areas does not furnish any single answer to the question, and, in all probability, the matter would not weigh heavily in the formation of Soviet war plans. The fact that optimum dates differ for the various areas which hypothetically are to undergo simultaneous invasion would minimize the importance of indigenous food even though it were considered apart from all other factors. The attached estimate, therefore, is primarily intended to indicate what this consideration might mean to Soviet planners as related to invasion of the particular areas in question. The study is addressed chiefly to the breadgrain supply because it is the principal indicator of the general food situation in most countries except the Far East where rice is an important food cereal. It must be assumed that it would be considered essential by the Soviets to feed the non-farm populations and particularly Communist collaborators in invaded countries adjacent to the USSR.

Under the considerations above, the optimum time for invasion of the four areas would be:

a. Western Europe, including Italy and Sicily but excluding the Iberian Peninsula: following the harvest (September-October) when indigenous supplies of breadgrains are maximum rather than in the spring when supplies are decreasing to minimum. The area requires an import of 9-10 million tons of breadgrain annually to maintain "normal" bread consumption, and the Soviet Union is in a position to supply only a small part of this quantity of grain. Occupation by the Soviets at any time would be followed by a decline in the food consumption of the non-farm populations to subsistence level, and distress in the industrial and urban centers would follow in the spring.

b. Scandinavia: Any time of the year. The breadgrain import requirement is less than a million tons, part of which the USSR is already supplying. Such part of the breadgrain requirement not produced domestically that the Soviets deemed advisable to supply could be covered by shipments from the USSR.

~~TOP SECRET~~
c. The Near East, including Turkey, Greece, and the Suez-Cairo area: A campaign could be undertaken at any time of the year. The northern part of the Asiatic Near East is a breadgrain surplus area with 1.2 million tons excess grain now in storage. Allocations for 1948-49 to Greece and the southern deficit Asiatic Near East totalled about 1.0 million tons.^{1/} The Soviets could cover such part of the deficit as they deemed advisable.

d. The Far East, including China, Korea, Japan and the Philippines: following the harvest (late summer-early fall) for reasons similar to those obtaining in the case of Western Europe. The area is breadgrain deficit requiring (for example) a 1948-49 allocation of 2.2 million metric tons, chiefly for consumption of non-farmers in industrial and urban centers.

The considerations on which the above conclusions are based are outlined in the attached appendix.

^{1/} Egypt's 1948-49 allocation of 0.4 million metric tons of wheat is largely in exchange for rice and does not represent a true cereal deficit.

APPENDIX I

BREADGRAIN SUPPLY AS A FACTOR IN
TIMING THE SOVIET UNION'S MILITARY OPERATIONS

Foreword

In timing military operations, the Soviet Union must be given priority to political expediency and logistics which may at any time outweigh economic or other factors. It is, therefore, difficult to select any particular month as being more or less favorable for backing expediency with force. Any untoward incident in connection with the Soviet's negative attitude toward cooperation with the West or incidents following, for example, a flare-up in Yugoslavia may precipitate at any time a conflict that might extend into military operations throughout the areas adjacent to the USSR and the western satellites forming the CORE of Kremlin domination. But a deliberate, planned, all-out simultaneous advance of the armed forces of the CORE into the adjacent areas (Scandinavia, Western Continental Europe, The Near East and the Northern Far East) is another matter.

Food Supply in the "Adjacent Areas" Deficit.

Prewar Background

The specified regions adjacent to the USSR considered as a whole constitute an area of food deficit. Taking breadgrain as an indicator, the prewar (1933-1937) combined average production of wheat and rye was 57.9 million metric tons.^{1/} During the 5-year period 1 July 1933 through 30 June 1938 indigenous production was supplemented by a combined average net importation of 7.6 million metric tons, indicating a

^{1/} Production data are conventionally referred to the 1935-39 average as a prewar comparison base but comparable trade data are not available for this 5-year period during which the combined average production of breadgrain was 58.1 million metric tons. All statistical data appearing in this appendix compiled from records published by or filed in THE OFFICE OF FOREIGN AGRICULTURAL RELATIONS, UNITED STATES DEPARTMENT OF AGRICULTURE.

Note: This appendix is the outcome of a conference between representatives of JIG and CIA at which JIG requested a written discussion of the main points touched on in the meeting.

combined average breadgrain supply of 65.5 million metric tons. During this period (1933-34 through 1937-38) the Core (that is, the USSR, the Eastern European satellites and Soviet occupied Germany) was in a surplus position exporting (net) a combined average of 3.7 million metric tons of breadgrain from a combined average production of 74.3 million metric tons.

Before the war, the Core and the "adjacent areas" considered as a unit area was on balance a region deficient in breadgrain requiring an average net import of 3.9 million metric tons to supplement a combined average production of 132.2 million metric tons to insure the prewar ("normal") average gross^{2/} supply of 136.1 million metric tons.

Reduction in Stocks Through Postwar Deterioration.

In 1947 combined breadgrain production in the "adjacent areas" adversely affected by weather and other factors had deteriorated to 50.6 million metric tons (87.4 percent of the prewar average). During the consumption year 1 July 1947 through 30 June 1948, reported shipments from all sources into the "adjacent areas" totalled 13.6 million metric tons indicating a combined breadgrain supply of 64.2 million metric tons or 98 percent of the prewar "normal" supply.

But between 1937 and 1947, population had increased some 10 percent so that the per capita supply of breadgrain in the "adjacent areas" was probably less than 90 percent of prewar. As a consequence, during 1947-48 bread was rationed, milling percentages were increased; the use of feed grains in the bread-mix was resorted to and, by 30 June 1948, reserve stocks were reduced to a minimum.

Within the Core, the 1947-48 breadgrain production situation was slightly worse than in the "adjacent areas". Combined production in 1947 totalled 64.1 million metric tons (86.2 percent of prewar).

The Eastern European satellites and the Soviet Zone of Germany required imports from all sources of 1.4 million metric tons in contrast to average prewar net exports of 2.8 million tons. Reserve stocks on 30 June 1948 were probably at minimum. Although the 1947 production

2/ The "gross" supply includes seed, waste, feed, industrial utilization and grain for human consumption.

of breadgrain in the Soviet Union was 47.0 million metric tons as compared with 48.1 million tons during 1933-1937, exports to all destinations totalled 1.7 million metric tons. Balancing the exports of the USSR against the imports into the satellites and the Soviet Zone of Germany indicates a statistical excess³ of only 0.3 million metric tons for the Core as a whole.

Considering the Core and the "adjacent areas" as a unit area, indigenous production of 114.7 million metric tons required supplemental net shipments of 13.3 million tons to bring the combined gross breadgrain supply to 128.0 million tons or 94.0 percent of the prewar average.

Postulating a 10 percent increase in population since prewar, the 1947-48 per capita supply of breadgrains throughout the Core-area was probably from 10 to 15 percent below the prewar level. Turnover stocks for feeding the non-farm populations,⁴ on 30 June 1948, were at minimum; nevertheless, the USSR, not taking into consideration the needs of certain classes of the non-farm population, may have held in reserve at least 2.0 million metric tons.

Because of the heavy deficit in breadgrain attended by depleted stocks (without considering other factors) the Soviet Union was in a poor position to assume responsibility of feeding the non-farm populations of the "adjacent areas" before the harvest of 1948.

Improvement in Breadgrain Supply During 1948-49.

In 1948, the combined breadgrain production in the "adjacent areas" totalled 60.9 million metric tons (105.2 percent of prewar). During the 6-months period 1 July 1948 through 31 December 1948 combined shipments from all sources to the area totalled 6.3 million tons. At the end of December 1948 imports into and cargoes of breadgrain enroute to the "adjacent areas" already insured a combined gross supply of 67.2 million metric tons which is 3.0 million tons greater than the whole 12 months supply during 1947-48 and 102.6 percent of the prewar gross supply. Assuming that between 1937 and 1948, population had increased some 11 percent, a 1948-49 per capita supply of breadgrain of about 92 percent of prewar "normal" was already assured at the end of December 1948.

- 3/ This does not indicate any true surplus in the Core-area because exports from the Soviet Union are based on political expediency and not on excess of production over domestic requirement.
- 4/ The bread supply problem facing governments is that of procuring breadgrain from producers and distribution of bread to non-farmers. Farmers look out for themselves.

Shipments of breadgrain⁵ allocated to the "adjacent areas" for the consumption year 1 July 1948 through 30 June 1949 were tentatively placed at 13.2 million metric tons indicating 6.9 million metric tons uncovered allotments to be shipped during 1 January through 30 June 1949. If this quantity of grain is shipped to the "adjacent areas" before 30 June of this year, the gross supply available before the new grain of the next harvest comes into local markets would total about 74.1 million metric tons or 113 percent of the 1933-34 through 1937-38 average gross supply. Taking into consideration an increase of population of 11 percent since 1937, a 1948-49 per capita breadgrain gross supply equivalent to about 102 percent of the prewar normal is indicated.

There is no assurance, however, that total allocations to the countries of the "adjacent areas" will be fully covered. Also, because of shortage of fats, oils and animal proteins, greater than normal dependence is being placed on breadgrain as a source of calories. There will probably be some building up of reserve stocks greater than the expected turnover supply, but these can hardly reach prewar proportions or even 2 percent of the normal gross supply.

The 1948 combined production of breadgrain in the countries at the core of Soviet domination totalled 75.5 million metric tons or 11.5 million tons greater than last year^{5/} and 1.8 percent greater than the 1933-1937 average. Black Sea shipments reported to have passed Istanbul total less than 350 thousand metric tons. Allocations requested by Finland and Czechoslovakia total around 660 thousand tons. There are no reports on overland or Baltic Sea shipments. It is probable that very considerable reserve stocks are being built up behind the iron curtain of which about 7.0 million metric tons are probably in the USSR.

While the indigenous supply supplemented by large imports has improved the 1948-49 breadgrain situation in the "adjacent area" as a whole in comparison with 1947-48, the local situations in the various regions varies materially as seen by the following regional analyses.

5/ Soviet Union 1948 production 4.6 million metric tons greater than in 1947 and Satellites 6.9 million tons greater.

REGIONAL SITUATIONS

Foreword

From the standpoint of communistic propaganda, an all-out invasion of the "adjacent areas" by the armed forces of the Soviets, which may include satellite divisions, may be looked upon, not so much as a conquest of those areas as the "liberation" of the downtrodden working classes from the "enslavement" of the capitalistic system. If this view is accepted as the basis for the attitude of the occupying armies, then the problems facing the invading Soviet administrators is quite different from those that had to be solved by the invading Nazis.

The ideology forming the basis of Nazi reorganization of the territories occupied by them predicated government of the masses (workers and farmers alike) by a small coterie of supermen; that is, Nazi or Fascist-trained specialists operating with the collaboration of a few indigenous would-be supermen. The status of the masses of the population was incidental to the status of the relatively few indigenous collaborators whose standard of living could be maintained at a high level with a relatively small proportion of whatever foodstuffs were available. Following a considerable period of peace, the stocks of indigenous and imported foodstuffs at the time of the Nazi invasion were normal or nearly normal. The shutting off of imports did not abruptly affect the reorganization by the administrative machine as far as the native and invading organizers were materially concerned. The timing of the invasion was not primarily determined by the seasonal availability of food supply.

The ideology forming the basis of Communistic reorganization of the territories occupied by them implies governmental control of the masses by the proletariat, who constitute a considerable proportion of the population. In the initial stages of the reorganization of the Eastern European satellites the welfare of the workers and even of the farmers was apparently of concern to the Kremlin. If this proves to be the case in the invasion of the "adjacent areas", the seasonal availability of food supplies may be taken into consideration as a factor of considerable importance, if not in some countries, the controlling factor. For that reason the planned invasion of the "adjacent areas" might well be timed to take place in the fall after indigenous field crops have been harvested when domestic supplies are at maximum rather than in the spring when indigenous grain and other field crops are in low local supply.

A. WESTERN CONTINENTAL EUROPE 1/

During the 5-year period 1933-1937 the area of Europe south of Scandinavia and westward from Austria and the US-UK zone of Germany to (but not including) the Iberian peninsula produced an average of 24.8 million metric tons of breadgrain--wheat and rye. The annual average utilization of breadgrain including seed, waste, feed for livestock, industrial uses and human consumption averaged 30.3 million metric tons, necessitating the annual net importation of 5.5 million metric tons.

Because of drought, war damage and other adverse factors, the 1947 breadgrain production was disastrously low --15.7 million metric tons. Although surplus producing countries shipped to the area 10.4 million metric tons during the period 1 July 1947 through 30 June 1948, a supply of only 26.1 million metric tons was available to cover the requirements of the area until the 1948 crop came into the markets. Because of the concurrent shortage of meats and fats, greater than usual reliance had to be placed on cereals as a source of calories during 1947-48 and the general per capita supply situation as compared with prewar was further aggravated by increased population. Strict rationing, high milling percentages, and the substitution of coarse grains in the bread-mix were resorted to. Reserve stocks were reduced to a minimum.

Although the 1948 production of breadgrains was 23.8 million metric tons (96 percent of normal), allocations of 9.5 million metric tons of breadgrains to be shipped into the area between 1 July 1948 through 30 June 1949 were made. By 31 December 1948 a total of 4.5 million metric tons had been shipped, leaving an uncovered balance of allotments of 5.0 million tons to be shipped during the 6 months 1 January through 30 June 1949.

If these 5.0 million tons are shipped before 30 June 1949, the total 1948-49 supply will be 33.3 million metric tons or about 110 percent of the prewar supply.

Assuming that there has been an increase in the population of the area of at least 10 percent and that no material increase is made to reserve stocks (which are already at a minimum) the per capita supply of breadgrain of the non-farm populations of the area should be at about the prewar level.

1/ Does not include Iberian peninsula nor Scandinavia.

That is to say, given an average harvest of breadgrain, a satisfactory level of bread consumption in the Western European area can be maintained only by the importation of some 9-10 million metric tons.

Since the Soviet Union and the satellites are in a position to supply Western Europe with only a small part of 9-10 million tons of breadgrain annually, the occupation of the area, attended by shutting off of imports, would necessarily be followed by a reduction of bread consumption compatible for the most part with indigenous production.

The onus of such a reduction in bread consumption would fall chiefly on the non-farm population in industrial and urban centers, who, taking into consideration the shortages in fats, oils and animal proteins, would be placed on a nearly subsistence diet even in years of normal production. With the breakdown of the capitalistic system of food procurement and distribution by professional grain-handling agencies with years of experience, a considerable period would be required after occupation to put into effect the Communistic system, which at best is inefficient, based, as it is, on political proficiency rather than on technical skill. Any attempt to cope with the problem of procuring and distributing breadgrain to the non-farm population, even temporarily, except immediately following the harvest, would be well nigh futile. Any attempt to organize procurement and distribution of breadgrain in the spring when indigenous supplies are low and reserve stocks at a minimum, would be inexpedient.

Unless political or logistic expediency outweigh the foregoing considerations in determining the course of action to be taken by the Kremlin, an all-out invasion of Western Europe will be timed in the fall of the year, at least for the next few years.

The Nazis invaded Western Europe in the spring, but, at the time of that invasion, reserve stocks were normal, the maintenance of any adequate standard of living among the masses of the population--farmers and non-farmers alike--was of secondary importance, consideration being given to only a relatively few native collaborators.

On the other hand, in the event of a Communist invasion, unless precipitated by political or logistic necessity, consideration should be given to maintaining a satisfactory standard of living for a very considerable number of the non-farm population (Communist collaborators), at least, in the

initial stages of the reorganization of the countries occupied. This was found difficult even in the Eastern Satellite States and the Soviet Zone of Germany, which, except for Czechoslovakia, were surplus producers of breadgrains.

If large shipments of breadgrains continue to be made to Western Europe so that reserve stocks are again built up to normal, the margin between timing an invasion to take place in spring or fall will be narrowed. Under the best of seasonal conditions, the occupation of Western Europe with a breadgrain deficit of 9-10 million metric tons should, logically, give the Kremlin pause for some time to come. The assumption would have to be made, however, that decisions of the Kremlin are based on logic.

B. SCANDINAVIA

Scandinavia produced an average of 1.8 million metric tons of breadgrain during the 5-year period 1933-1937. Imports during 1933-1934 through 1937-1938 totalled 0.8 million tons indicating a total gross supply of 2.6 million metric tons.

In 1947, production of breadgrain had decreased to 0.8 million metric tons which was supplemented by shipments from all sources of 0.8 million tons. During 1947-1948 Scandinavia, by severe rationing, subsisted on 1.6 million metric tons of breadgrain.

In 1948, production of breadgrain was 1.75 million metric tons. Allocations were made to Scandinavian countries totalling 0.52 million tons, indicating a gross supply for 1948-1949 of 2.27 million tons. By 31 December 1948, shipments made by the United States, Canada, and the Soviet Union (chiefly to Sweden) totalled 0.22 million tons, leaving 0.3 million metric tons of the combined allotments uncovered. In case of the invasion of Scandinavia, the USSR might easily supply 0.3 million tons of breadgrain to Scandinavia.

Conclusion

There are no current factors of breadgrain supply that would necessarily affect the timing of an invasion of Scandinavia by Soviet forces.

C. THE NEAR EAST 6/

The Near East as a whole is normally a region deficit in breadgrain. During the prewar 5-year period 1933-1937 combined production totalled 7.2 million metric tons. Net imports during 1933-1934 through 1937-1938 averaged 0.4 million metric tons indicating a "normal" prewar gross supply of 7.6 million metric tons.

Greece, the Aegean Islands, and Cyprus produced, on the average, 0.8 million metric tons of breadgrain, and imported 0.5 million tons, indicating an annual supply of 1.3 million tons.

The Asiatic group of countries produced, on the average, 6.4 million metric tons of breadgrain. Combined domestic utilization averaged 6.3 million tons leaving a small exportable excess of 0.1 million metric tons.

During and after the war Greek production deteriorated to such an extent that by 1947, the breadgrain harvest totalled 0.62 million metric tons, but increased imports (almost exclusively from the United States) of 0.66 million tons brought the annual supply up to 1.28 million tons.

Detailed Postwar Background

While most countries in the Asiatic Near East were adversely affected by war and postwar conditions, Turkish production of breadgrain by 1947 had increased 0.54 million tons over the prewar average bringing the total to 3.9 million tons from which there was a negligible net export.

Syria in 1947, with a production of 404 thousand metric tons, imported 11 thousand tons indicating a required total supply of 415 thousand metric tons.

Iran, with a 1947 production of 1.925 thousand metric tons, imported 9 thousand tons indicating a required total supply of 1.934 thousand metric tons.

The other countries in the area produced 518 thousand metric tons, and imported 413 thousand indicating a total supply of 931 thousand metric tons.

6/ For purposes of this discussion the Near East includes Greece and the Aegean Islands, Cyprus, Turkey, Syria, Lebanon, Palestine, Transjordan, Iraq, Iran, Saudi Arabia, Aden and Persian Gulf region. Egypt is not included. Although Egypt was allocated a 1948-49 breadgrain import of 437,000 tons, rice exports of 330,000 metric tons are indicated. Normally Egyptian breadgrain imports are negligible.

Vulnerability of the 1948-1949 Situation

Greece produced 808 thousand metric tons of breadgrain in 1948 and was allocated shipments of 610 thousand tons, indicating a total supply for 1948-49 of 1.42 million metric tons. By 31 December 1948, 0.32 million tons had been shipped from source countries.

Turkey produced 4.6 million metric tons of breadgrain in 1948. If the total requirement is 3.9 million tons, Turkey will have on 30 June 1949 a carryover ^{7/} of 0.7 million tons of wheat and rye.

Syria produced 626 thousand metric tons of wheat in 1948, and by 31 December 1948 an additional 65 thousand tons had been consigned to this country. If the total requirement is 0.4 million tons, Syria will have on 30 June 1949 a carryover ^{7/} of 0.3 million tons of wheat.

Iran produced 2.1 million metric tons of breadgrain in 1948. If total requirement is 1.9 million tons, Iran will have on 30 June 1949 a carryover ^{7/} of 0.2 million tons of wheat.

The other wheat growing countries in the area produced 542 thousand metric tons of wheat. The area as a whole was allocated 430 thousand tons indicating a total supply of 972 thousand tons. By 31 December 1948 shipments of 102 thousand metric tons had been consigned to this area.

Conclusions

Three countries in the Asiatic Near East have in storage, over and above indigenous breadgrain requirements during 1948-49, some 1.2 million metric tons against uncovered allotments of the southern countries of 0.3 million metric tons giving a statistical excess balance of about 0.9 million metric tons. This grain, if not exported or destroyed, would be readily accessible to the invading Soviet forces. There would be no seasonal element affecting the timing of the invasion which could be based on military considerations alone.

In Greece, the 1948 indigenous production of breadgrain was 0.8 million metric tons. Shipments as of 31 December 1948 totalled 0.3 million tons, indicating a total supply of 1.1 million tons. During

7/ Provided no grain has been exported.

1947-1948 the population of Greece subsisted on 0.9 million tons. The 1948-1949 breadgrain supply (even if no further shipments are received) is already larger than last year. There is in Greece no material food supply factor to affect the timing of an invasion by the Soviet forces.

D. FAR EAST

Manchuria and China are wheat deficit countries that during the 5-year period 1933-1937 produced an average of 22.4 million metric tons of wheat and imported 0.7 million tons annually largely to supplement the indigenous supply of wheat to large non-farm centers of population. Wheat, however, is of secondary importance as a food cereal in this area where kaoliang, millets and rice make up the principal source of the daily caloric intake. Of these cereals rice was in mildly deficit production averaging before the war about 35.1 million tons (milled basis) which was supplemented by imports of 0.7 million tons for non-farm consumption in large population centers. Manchuria produced an average of only 0.3 million tons of rice and imported about 50 thousand tons.

By 1948 wheat production in China had increased to 25.8 million metric tons while Manchurian production had decreased to 0.6 million (prewar 0.9 million metric tons).

The 1948 production of rice (milled basis) in China has been placed at 33.7 million tons. Manchurian expectancy in rice production has been approximated at 0.25 million tons.

As far as these two cereals are concerned the 1948 combined production of 60.4 million tons is 4.5 percent better than the prewar average of 57.8 million metric tons. On the other hand kaoliang, millet and proso millet have apparently decreased from roughly 159.6 million to 154.3 million metric tons. The total production of these five food cereals in 1948 was about 1.2 percent below prewar but in view of an increase of at least 10 percent in the population the per capita supply for 1948-49 was probably not more than 89 percent of prewar.

In 1948 about 80 percent of the wheat production, 97 percent of the kaoliang production, 95 percent of the millet production and 77 percent of the proso millet production, was harvested on lands already under the control of the Chinese Communists. On the other hand, only 38 percent

of the rice was produced in Communist territory. Considering the combined production of all five food cereals 60 percent was in Communist territory and 40 percent in non-Communistic.

Because of relatively larger food supplies in the Communist territory, the occupation of centers of large non-farm population has been attended with not too marked distress among the inhabitants. But the occupation of southern China has apparently given the Communists pause in view, among other factors, of the problem of feeding the non-farm population. Should Southern China be occupied by Soviet forces, the problem of feeding the non-farm population during the initial stages of re-organization would be less difficult after the harvests than during the spring when imports had been cut off and supplies of indigenous food grains were low.

Southern Korea presents a similar case to that of China. A pre-war average production 252 thousand metric tons of wheat necessitated a yearly import of 52 thousand tons to cover an annual wheat disappearance of 304 thousand tons. By 1948, production had decreased to 191 thousand tons and allocated shipments from the United States were placed at 102 thousand tons. Rice is the chief cereal food of Southern Korea. Prewar production averaged 2.8 million metric tons (milled basis) from which 1.0 million tons were exported. The 1948 production was 2.2 million tons which is more than sufficient to cover domestic requirement.

Although logically, Soviet forces could easily occupy Southern Korea at any time, it is probable that they would not do so at a time when rice supplies were at a minimum unless driven by political expediency.

Japan produced an average of 1.3 million metric tons by wheat before the war and imported only 0.1 million tons annually. By 1948 wheat production had fallen off to 1.0 million tons while allocated shipments from the United States increased to 1.5 million tons, to compensate somewhat for shortage in the rice supply, the production of which had declined to 8.2 million metric tons as compared with 8.5 million tons before the war. Before the war Japan imported 1.7 million tons (net) of rice.

With the certainty of the elimination of imports following Soviet occupation the problems of reorganizing Japan under the Communistic system in view of feeding the non-farm populations would be considerably less difficult to solve after the harvests than in the spring when imports have been cut off and indigenous supplies are low.

Philippine Islands. Food production in the Philippines now approximates the prewar level when net imports of cereals were about 3 percent of total consumption. The 1948 rice crop is estimated at 1.7 million metric tons (milled basis), one of the best on record. Imports of 0.1 million tons will be required, however, to avoid a shortage before the harvest in the fall of 1949. Wheat flour imports average around 0.1 million metric tons.

In view of the small dependence placed on imports, it is improbable that the seasonal supply of cereal foods would be a factor in timing the occupation of the Philippines by Soviet forces.